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ABSTRACT

A review of more than 500 empirical studies conducted since 1970 on the achievement of Mexican Americans identified prior claims supported and/or refuted by data, isolated promising hypotheses for further investigation or educational implementation, and made recommendations for improvement of schooling, school-home relations, and teacher preparation. The review found widely accepted stereotypes about Mexican Americans' lack of internal locus of control, reluctance to compete, depressed intelligence, field dependence orientation in learning, and failure to acculturate to be false. Factors found to be associated with increased achievement included language usage, bilingualism, bilingual education, positive self-concept, home independence training, and school/classroom affective climate. Findings indicated that teacher warmth and enthusiasm and absence of authoritarianism and punitiveness significantly impact academic achievement of Mexican American students; cooperative learning environments produce greater academic gains than competitive or individualistic learning environments for all students; students in low-track high school classes receive less educational opportunities than students in heterogeneous groups; and the fact that the self-concept of Mexican Americans does not appear to increase either with succeeding generations or with the age of the individuals suggests that these students are not mastering their environment and are not surrounded by nurturant significant others in school or in the community. (NEC)

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REVIEW OF FACTORS AFFECTING LEARNING OF MEXICAN-AMERICANS

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Paper presented at the National Association for Chicano Studies (El Paso, Texas, April 10-12, 1986).

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REVIEW OF FACTORS AFFECTING LEARNING OF MEXICAN-AMERICANS

Introduction. In 1973, Hernandez reviewed the literature on the academic achievement of Mexican-American students and found studies investigating the relation of selfconcept, motivation, anxiety, alienation, measured intelligence, value orientation, cultural differences, linguistic problems, language usage and environment to academic achievement. While research studies were not abundant at the time, there was an intense theoretical exploration of the issues related to the achievement of ethnic minorities.

Conclusions reached in the 1973 survey of research are the following:

1) Students' academic achievement is related to cultural and linguistic aspects in which a child is reared; a) Mexican-Americans have value orientations that bring about a conflict between the majority and minority groups; b) many of the strong value positions held by Mexican-Americans revolve around the family and the welfare of the family, contributing to the conflict with the major society in making decisions involving choices between the family and some other "good"; c) the language used by the family, if different from English, can become one of the student's major problems, if not the most crucial, in relation to success in school; d) other orientations promote a "live now" attitude that is counterproductive to achievement.

2) Because of the increased likelihood that Mexican-Americans live in poverty as compared to the major group, they are more often victims of poor health, physical disorders, ineffective health families, and unresponsive educational systems.

3) Differences in psychological test scores may not indicate that the cause of these differences is an inferior mental ability; rather, factors highly correlated with these test scores such as SES, adequate physical need satisfaction and cultural orientations, need to be investigated for influence on achievement.

4) Bilingual education is a strong possibility in learning English, thereby promoting a flexible and fruitful command of both languages.

Since 1970, however, many empirical studies on Mexican-American students have been conducted, exploring factors reviewed previously as well as new topics such as cognitive style, locus of control, social motives, bilingual education, and school practices. In spite of the pressing need to understand the causes underlying the underachievement of Mexican-American students, no comprehensive review of research had been carried out in the last decade.

Purpose and methodology. The purpose of the study reported here was: 1) to review the literature on the achievement of Mexican-Americans, by considering empirical studies published within the last 15 years, 2) to identify claims that are empirically supported by data or have been refuted and discarded; 3) to isolate promising hypotheses that may be used for further investigation or for educational implementation; and 4) to make recommendations for improvement of schooling, school-home relations, and teacher

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preparation.

The current review includes journal articles, conference reports and books, as well as documents from ERIC, Dissertation Abstracts International, and the Education Index. All studies containing the heading Mexican-Americans" were considered. The literature was examined, categorized and summarized; categories used were: family, subcultural factors, cognitive style, social motives, self-concept, locus of control, intelligence testing, the school, bilingual education, language learning, and social stratification. Over 500 studies were reviewed and compiled in a bibliography.

Findings. The present review has found evidence conflicting with widely accepted interpretations concerning the underachievement of Mexican-Americans, e.g., lack of internal locus of control, reluctance to compete, depressed intelligence, field dependence orientation in learning, and failure to acculturate. These results are reported under the heading: "Factors Discounted in Explaining Underachievement."

Other studies reviewed suggest a variety of factors related to increased achievement of Mexican-Americans, such as: language usage, bilingualism, bilingual education, positive self-concept, home independence training, and school and classroom affective climate. These results are reported under the heading: "Factors Associated with Increased Achievement".

Factors Discounted in Explaining Underachievement

Locus of control. Fatalism and other forms of passivity have been attributed to Mexicans and by extension to Mexican-Americans who are stereotyped as believing in luck, fate, and chance (Justin, 1970; Scott and Phelan, 1967; Lewis, 1961). Since data indicate that persons who score high in internal control are more likely to exert control over their environment than their external counterparts, it has been hypothesized that this orientation could be a causal factor in the underahievement of Mexican-Americans (Nelson et al., 1980). The claim that Mexican-Americans are less internally oriented than Anglos did not receive consistent support in the present review (Cole et al., 1978; Garza and Aimes, 1976; Padilla and Ruiz, 1975). It appears that membership in an economic class, rather than a racial group, is a critical factor in a person's locus of control (Bender and Ruiz, 1974). As long as a large percentage of Mexican-Americans live in poverty, their locus of control will tend to be externally oriented. Research data did not indicate that Mexican-Americans live in poverty because of a cultural trait of fatalism.

Social motives. Another factor suspected of contributing to the underachievement of Mexican-Americans is competition. Several studies compared samples of rural Mexican children with Anglo children, finding Mexican children significantly less competitive (Kagan and Madsen, 1971; Shapira and Madsen, 1969; Madsen, 1967). Other studies indicate that urban Mexican-Americans are closer to Anglos than to rural Mexicans in this measure. It also appears that cultural differences in competitiveness reported in several studies may have been inflated by noncultural factors

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of the populations sampled, such as SES and rural/urban settings (Kagan et al., 1977; Avellar and Kagan, 1976). Although Mexican-American students appear to have a less competitive orientation than Anglo students, this orientation was not related to decreased school achievement (Kagan et al., 1977). Furthermore, recent studies suggest that cooperative learning environments produce greater academic learning among most students than competitive learning environments (Johnson and Johnson, 1985).

Intelligence. Intelligence measures have been examined in the literature to determine their influence on the depressed academic achievement of Mexican-American students. Only in rare cases have Mexican-American children scored on par with Anglo children (De Avila et al., 1976; Coleman et al., 1966; Carlson and Henderson, 1950; Garth and Johnson, 1934). These results have caused the researchers to question not only the test results, but the instruments themselves, test adminstration procedures, and the very motives for their use (Mercer, 1977; Carver, 1975; Stodolsky and Lesser, 1967). It has not been empirically established that Mexican-Americans, as a group, are less intelligent than their Anglo counterparts, or that low IQ scores are a major cause of underachievement. Sociocultural factors were found to correlate significantly with IQ scores, however. Data indicate that Mexican-American high scorers tend to come from less crowded homes, homes where English is the predominant language, have mothers with high expectations for their children and fathers who were reared in an urban environment (Stedman and McKenzie, 1971).

Cognitive style. A different cognitive style resulting from cultural differences was hypothesized to be a major influence on the underachievement of Mexican-American students (Ramirez, 1973). This position assumed that because Mexican-Americans, as a group, are more field dependent than students of the majority culture, more cooperative, and personal in their relationships, they possessed a different mode of cognition that does not match the schools' instructional practices. Results of studies investigating the field orientation of Mexican-Americans do not support this hypothesis. It was found that measured field independence among Mexican-Americans increases with years of schooling; females have significantly higher scores than males; scores are related to the restrictiveness of the environment of the subgroup and field independence may appear at varying degrees depending on the setting of the sampled population (Kagan and Zahn, 1975; Ramirez and Price-Williams, 1974). Although Mexican-American children are more personal and cooperative than Anglo children, results do not indicate that these disparities create a significantly different cognitive style to justify an altered methodological or instructional approach by the schools (Kagan and Buriel, 1977). Studies have not substantiated a consistent relationship between field dependence and achievement (Buriel, 1978).

Acculturation. It has been claimed that Mexican-Americans resist acculturation, thereby failing to adjust to the majority group's norms and to school expectations. Their underachievement is thus attributed to the persistent cultural differences that do not equip them to succeed in school.

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One of the most frequently discussed indicators of acculturation in the research literature is language usage. Studies reviewed indicate that second generation Mexican-Americans and subsequent generations are shifting to English (Lopez, 1978; Patella and Kuvlesky, 1973). One of the reasons Spanish is maintained appears to be a response to continuing immigration: the supply of adult Spanish speakers arriving from Mexico makes Spanish necessary in certain areas. Intragenerational loyalty to Spanish and its intergenerational transmission do not to appear to be less for Mexican-Americans than for other immigrant groups. Mexican-Americans are speaking more English while educated families must struggle to have their children remain bilingual.

The nature of educational aspirations is another indicator of acculturation. Mexican-Americans show high regard for schooling and see education as a means of attaining success. Frequently, however, high aspirations exist, but the knowledge of how to help children remain in school and make the educational system responsive to their needs is unavailable to the family (Gecas, 1980; Garcia, 1973).

Other characteristics attributed to Mexican-Americans that suggest lack of acculturation, such as present-time orientation, fatalism, and low assertiveness, are traits found among the poor, regardless of ethnic orgin. These characteristics of a "culture of poverty" are not manifest among middle-class Mexican-Americans (Shannon, 1975, 1976; Casavantes, 1970). A decrease of the extended family, a smaller number of children per family unit, and less emphasis on differentiating the roles and treatment of boys and girls are additional indicators of acculturation (Mena, 1977).

Studies attempting to find cultural differences between Mexican-American and Anglo students that affect schooling have generally been unsuccessful. It has been found that when SES factors are controlled, few differences exist between the two groups other than a greater family orientation, a different language, different nurturance/interpersonal intimacy needs, and a Mexican Catholic morality. These studies have found Mexican-Americans neither culturally deficient nor culturally different in those factors that appear to affect achievement (Ramirez and Castaneda, 1974; Casavantes, 1970).

Several variables appear to inhibit acculturation. The "barrio" with its ferment of separatism (Cardenas, 1971), the proximity to the border, a person's length of stay in the United States, the degree of urbanization and economic strength, and the degree of prejudice in the community, predispose Mexican-Americans to acculturate at different rates and to different degrees (Castaneda, 1974). Since the flow of immigrants is continuous, the Mexican-American community is not a homogeneous group sharing many similarities but is a series of groups moving across a continuum of acculturation at different rates, thereby creating a very complex profile. It may be concluded that Mexican-Americans, at times against their will and in an inconsistent manner, are acculturating.

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Factors Associated with Increased Achievement

Language. A number of studies on family characteristics influencing the educational attainment of Mexican-Americans have found a relationship between the amount of English used at home and achievement (Evans and Anderson, 1973; Anderson and Johnson, 1971). Children from third generation families that evidence little or no English usage at home experience more difficulty with English instruction at school. A significant improvement in occupational levels among second-generation families has been associated with the adoption of English as an additional language in the home (Garcia, 1981). Students from families predominantly using English were found to experience greater parental pressure to complete high school than those from families retaining Spanish almost exclusively. Furthermore, independence training in the home increased with the amount of English spoken and with the increased occupational level of the father (Anderson and Evans, 1976). English proficiency has been found the most consistent predictor of achievement in most minority groups, including Mexican-Americans (De Avila et al., 1979). Conversely, substandard English language performance has been linked to academic underachievement (Gerace and Mestre, 1981; Duncan and De Avila, 1979; Knief, 1975).

Bilingualism. Bilingualism, the ability to use two languages, has been found to aid in the development of greater linguistic flexibility and creativity, which in turn, affects greater linguistic problem-solving skills (Peal and Lambert, 1962). It appears that in the process of becoming bilingual some aspect of cognitive development is stimulated; bilinguals appear to be able to conserve length at an earlier age than monolinguals and enter the Piagetian concrete operations stage before monolinguals. Data available on effects of bilingualism on cognitive development and measured intelligence tip the balance in favor of the positive effects of bilingualism (Duncan and De Avila, 1979; Ben-Zeev, 1977; Carringer, 1974; Liedtke and Nelson, 1968). It must be noted that a large number of studies yielding these data were conducted in Canada, northern Europe, and Israel, while a smaller number have been conducted with Mexican-Americans.

If bilingualism is desirable, should instruction be conducted in the first or second language? Some authors claim that instruction in the child's native language is more likely to result in improved achievement, particularly when the child's language holds a high status in the home and the community (Cohen, 1980; Cummins, 1979; Skutnabb-Kangas, 1979; Duncan and De Avila, 1979).

Bilingual Education. A number of research studies have investigated instructional methodologies and program effectiveness in bilingual education. While some studies have yielded contradictory results (AIR Study, 1978), in general, the results have been favorable indicating that students in bilingual education programs experience gains in achievement, self-esteem and school attendance. (Richardson, 1980; Mace-Matluck, 1980; Troike, 1978; Balinsky and Peng, 1974; Fisher, 1974; Covey, 1973). The American Institute of Research (AIR) study (1978) on the impact of ESEA Title VII bilingual education programs reviewed 38 projects and found that

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students in these programs scored at a lower level in English language arts than non-Title VII students and at the same level in mathematics. Dulay and Burt (1979) found that out of these 38 research studies dealing with the effectiveness of bilingual instruction only nine studies met minimum research criteria; the remainder had serious weaknesses in research methodology. In a similar study, Troike (1978) reviewed 12 bilingual education programs finding evidence attesting to their effectiveness. On the other hand, it appears that some bilingual education programs are lacking instructional quality. As with any school innovation, bilingual education, regardless of its promise and validity, is only as effective as the competence of those implementing it.

Self-concept. Several studies compared self-concepts of Mexican-American and Anglo students and found several significant relationships between self-concept and academic achievement. Some researchers have found evidence of a lower self-concept among Mexican-American students in comparison to Anglo students (Evans, 1969; Anderson and Safar, 1967; Coleman, 1966), while others found no differences (McKibbin, 1977; Little and Ramirez, 1976; Christensen, 1973; Lopez, 1973; De Blassie and Healy, 1970; Carter, 1968).

Male and female low SES Mexican-American students do not differ significantly in overall levels of self-concept; sex and skin color affect their perceptions of personal worth only slightly. Students from lower SE levels do not report themselves as having the degree of inferiority and worthlessness that authors have generally attributed to members of this social class (Maldonado, 1972).

School ethnic composition appears to exert a strong influence on the achievement of Mexican-Americans, with higher performance scores reported in schools having a high percentage of Anglo students (McPartland and York, 1967; Coleman, 1966). Mexican-American students appear more sensitive to school contextual effects than Anglos; school racial-ethnic climate had the largest effect on dropout behavior in a study reported by Felice (1973). Lopez (1980) found that both Anglo and Mexican-American children reported higher self-concept scores when they constituted a majority in the classroom.

The self-concept of Mexican-Americans does not appear to increase with succeeding generations or with increasing age of the individuals. A high self-concept of ability coupled with English usage in the home have been found the overall best predictors of student success in school (Anderson and Johnson, 1971).

Locus of Control. Measures of locus of control appeared to have the power to predict educational as well as vocational aspirations and achievement for both Anglo and Mexican-American students, but especially so for Mexican-Americans. The relationship between locus of control and self-concept to school achievement was greater for Mexican-American students than for Anglo students (Nelson et al., 1980).

Independence Training. There is a positive relationship between home independence training and academic achievement. Independence training is

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the result of the amount of autonomy in decision making the child is accorded, and the effort of parents to explain their reasons for rules and consequences. Fathers appear to be more democratic with girls than with boys, and Mexican-American mothers subject their children to less independence training than Anglo mothers. In contrast with Anglo students, Mexican-Americans as a group express more concern for adult approval than peer approval of their actions. For both groups of students high self-concept of ability and democratic independence training are positively related to academic achievement. Mexican-American children perceive themselves as having much less autonomy in decision making than their Anglo peers. They also see their parents as less willing to explain their reasons for rules and punishments. An increase in the father's education is related to increased autonomy for the child (Anderson and Evans, 1976; Evans and Anderson, 1973). The educational level of Mexican-American mothers is positively associated with the use of inquiry and praise as home teaching practices and inversely related to modeling strategies (Laosa, 1978, 1977).

Among Anglos, Blacks and Mexican-Americans, females score higher than males on family achievement orientation and lower on individual achievement, suggesting that females may be socialized to identify with the family more than males. Mexican-American males scored the second highest of the groups studied on family achievement, suggesting that they are socialized to achieve both for self and for the family. Father-absent boys are found to show significantly more signs of social and emotional maladjustment than father-absent Mexican-American girls (Ramirez and Price-Williams, 1976). Mothers of high-competence children view themselves as more hopeful, unselfish, lenient, and less aggressive. High achieving Mexican-American families appear to manifest a semantic and attitudinal structure more similar to the Anglo middle class than to low-potential familes (Stedman and McKenzie, 1971).

Classroom climate. Overall, studies reviewed on teacher practices indicate that significant disparities exist between teacher behavior directed toward Mexican-American students when compared to behavior directed toward Anglo students in the amount of praise given, number of questions asked, and amount of teacher contact established (United States Commission on Civil Rights, 1972; Jackson and Cosca, 1974). Low achieving Mexican-American students receive much less teacher contact than middle and high achieving Mexican-American students (Mendoza et al. 1972).

Studies using teachers' perceptions of their students indicate that language, dialect, social class, and ethnicity significantly influence teachers' perceptions and expectations (Figueroa and Gallegos, 1980; Stedman and Adams, 1973; Jensen and Rosenfeld, 1974). Students from different ethnic, language, and social backgrounds were evaluated least favorably, and perceived as less communicative, less assertive, and less bright than Anglo students.

Mexican-American students perceive their teachers as friendly and warm, but not helpful with school work. Furthermore, for Mexican-Americans, variables under teacher control such as warmth and enthusiasm, absence of

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authoritarianism and punitiveness, were the most influential in increasing school attendance and significantly impacted achievement. While classroom climate appears to have little effect on the success of Anglo students, it appears to be a substantial variable on the academic performance of Mexican-Americans. Mexican-American students need teachers who are nurturant and skillful in interpersonal relations (Engstrom, 1981; Espinosa et al., 1979).

Studies on methodology for changing student behavior indicate that effective methods for improving Anglo students' behavior have also positively affected Mexican-American students (Zimmerman and Pike, 1973; Allen, 1975; Morgan, 1975).

As with studies of teacher behavior, analyses of school grouping practices also show evidence of significant disparities between Mexican-American and Anglo students. School organization patterns for grouping and tracking perpetuate social stratification patterns observed in the larger community. Poor and minority students are found in disproportionately large percentages in low-track high school classes, while the opposite is the case for Anglo students. Tracking gives low and high ability students different educational opportunities. Low ability tracked students receive less attention from high school counselors than college bound students (Oakes, 1981a, 1981b; Rosenbaum, 1980a, 1980b; Amato, 1980; Esposito, 1973; Rosenshine and Furst, 1971).

Conclusions.

This review found widely established stereotypes about Mexican-Americans' external control, reluctance to compete, inferior intelligence, and failure to acculturate, to be false. The studies reviewed indicate that:

- Mexican-Americans do not have a different locus of control than Anglos. Membership in a social class and not ethnicity is the crucial factor in a person's locus of control.
- Although Mexican-Americans have a less competitive orientation than Anglos, the difference is not significantly large and this factor is not related to school achievement.
- It has not been empirically established that Mexican-Americans, as a group, are less intelligent than their Anglo counterparts, or that low IQ scores are a major cause of underachievement.
- Mexican-Americans are acculturating to the majority's group norms and school expectations.

The review yielded results which find a relationship between language usage, bilingualism, bilingual education, self-concept, locus of control, home independence training, school affective climate, and the academic

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achievement of Mexican-American students. These findings may be classified as relating to home, school, and society:

- There is a positive relationship between home democratic independence training (problem solving, non-authoritarian orientation) and academic achievement.
- The use of English as an additional language in the home, or as the main language, is related to academic success. Substandard English performance has been linked to academic underachievement.
- English language proficiency is the most consistent predictor of academic achievement for Mexican-American students.
- Bilingualism has a positive effect on the cognitive development of children.
- A high self-concept of ability and internal local of control are strong predictors of school success.
- An increase in the parent's educational level is related to an increase in home independence training and positive parenting interactions.
- Teacher warmth and enthusiasm, and absence of authoritarianism and punitiveness, significantly impact the academic achievement of Mexican-American students, much more so than for Anglo students.
- Students in bilingual education programs experience gains in achievement and self-concept.
- Cooperative learning environments produce greater academic gains than competitive or individualistic learning environments for all students, but particularly for Mexican-Americans.
- The relationship between locus of control and self-concept to school achievement is greater for Mexican-Americans than for Anglo students.
- Mexican-American students achieve greater academic gains under teachers who are nurturant and skillful in interpersonal relations.
- Students in low-track high school classes receive less educational opportunities than students in heterogeneous groups.
- A large percent of Mexican-Americans live in a world of poverty. As long as this condition exists their academic achievement is likely to remain substandard.
- The fact that the self-concept of Mexican-Americans does not appear to increase either with succeeding generations or with the age of the individuals, suggests that these students are not mastering their environment and are not surrounded by nurturant significant others in school nor in the community.

Summary.

When comparing results of studies on achievement of Mexican-Americans over a 15 year span, it can be said that "we have come a long way." In 1970 the blame for underachievement was placed on the individual who was inferior as a result of genetics and cultural influences. Midway in the seventies fault was placed on the schools which were insensitive to needs of Mexican-American children and did not provide the appropriate instruction. During all these years discussion on the achievement of the Mexican-Americans has treated them as a monolithic group, when in reality there are a multitude of groups evolving along several continua. Results however, suggest that SES, language skills, home and school nurturance and

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independence training, are key factors determining the achievement of Mexican-Americans. When all these factors are held constant, differences between Anglo and Mexican-American students are more a matter of emphasis while the similarities are many. For example, the priority each group assigns to family and personal future. A characteristic that cannot be overlooked when considering instructional approaches for Mexican-Americans is their preference for warmth and intimacy in interpersonal relations, and their inclination toward cooperative exchanges when learning. It may be that this preference and cultural trait is a positive contribution that Mexican-Americans can bring to the majority culture which at times becomes immersed in excessive competition and individualism. Research indicates that, unlike years ago, our perceptions have changed to "Mexican-Americans are OK."

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